Online Gift Planning Fundamentals

AGENDA

Wednesday, June 3 (Day1)
and
Thursday, June 4 (Day 2)

Wednesday, June 3, 2020

Day 1

Timing according to time zones

8:00 a.m. – 12:00 p.m. PT
9:00 a.m. – 1:00 p.m. MT
10:00 a.m. – 2:00 p.m. CT
11:00 a.m. – 3:00 p.m. ET
12:00 p.m. – 4:00 p.m. AT

Day 1 - Session 1

8:00 – 10:00 a.m. PT
9:00 – 11:00 a.m. MT
10:00 a.m. – 12:00 p.m. CT
11:00 a.m. – 1:00 p.m. ET
12:00 p.m. – 2:00 p.m. AT

- Introductions
  - Course overview and learning expectations
  - Charitable landscape in Canada with updates on what we know of COVID-impact
  - Strategic Gift Planning and donor-centred approach
  - Social Capital and Values-based planning
  - *Personal learning objectives - Goals*
- Key concepts
  - Primer on taxation and charity principles - glossary of terms

- Tax treatment of a cash gift and net cost of gift
- The donor conversation and learning a donor's story
- Getting the visit
- Discovery questions for blended (major/planned) visits
- Involving the donor's family
- Gift Acceptance Policies

BREAK

10 – 10:30 PT
11 – 11:30 MT
12 – 12:30 CT
1 – 1:30 ET
2 – 2:30 AT

<u>Day 1 – Session 2</u>

10:30 a.m. – 12:00 p.m. PT
11:30 a.m. – 1:00 p.m. MT
12:30 – 2:00 p.m. CT
1:30 – 3:00 p.m. ET
2:30 – 4:00 p.m. AT

- Publicly listed securities
  - How PLS gifts work
  - Prospective donors for PLS
  - Marketing PLS
  - Administrative tips for PLS
- Charitable Bequests
  - How bequests work
  - Probate fees and discussions across Canada
  - Tax treatment of bequest gift
  - Talking about bequests
  - Bequest Administration
  - Marketing Bequests
  - New Will Power campaign and White Paper insight
  - Tracking and reporting, stewardship and recognition on Bequests

Thursday, June 4, 2020

Day 2

Timing according to time zones

8:00 a.m. – 12:00 p.m. PT
9:00 a.m. – 1:00 p.m. MT
10:00 a.m. – 2:00 p.m. CT
11:00 a.m. – 3:00 p.m. ET
12:00 p.m. – 4:00 p.m. AT

Day 2 - Session 1

8:00 – 10:00 a.m. PT
9:00 – 11:00 a.m. MT
10:00 a.m. – 12:00 p.m. CT
11:00 a.m. – 1:00 p.m. ET
12:00 p.m. – 2:00 p.m. AT

- Review of concepts from day before

- Gifts of Registered Funds
  - How they work
  - Prospective donors for gifts of Registered Funds
  - Tax treatment of gift of Registered Fund
  - Marketing and Administering Tips
- Gifts of Life Insurance
  - How they work
  - Advantages and disadvantages of LI gifts
  - Two common ways they work
    - Tax credits during lifetime
    - Tax credits for proceeds on death
  - Examples of tax treatment
  - Marketing insurance gifts
  - Administrative considerations

- Gifts in kind
  - How they work
  - Example of gift of principal residence
  - Target audience

- *Case study done in groups (breakout Zoom rooms) – present to larger group after the break*

BREAK

10 – 10:30 PT
11 – 11:30 MT
12 – 12:30 CT
1 – 1:30 ET
2 – 2:30 AT

Day 2 – Session 2

10:30 a.m. – 12:00 p.m. PT
11:30 a.m. – 1:00 p.m. MT
12:30 – 2:00 p.m. CT
1:30 – 3:00 p.m. ET
2:30 – 4:00 p.m. AT

Different options donors have to support your charity (current and future trends)

  - How a Donor Advised Fund works
  - A new DAF landscape of philanthropy
  - Other funds
- Involving Others
  - Working with Professional Advisors
- *Personal Action Plan Review*

Adjournment